

## Forms

A form is a structured document with spaces reserved for entering information

**Did you know....**that you can create a form that can be printed and filled in on paper **or** a form that users view and complete in Word? .

## Using Form Fields

Form fields are the locations in an online form where the user fills in information, and these can be inserted in the middle of a text paragraph, in a table cell or in a frame. In a protected form, users can only input information in a form field or sections in which the protection has been removed.

Three categories of form field are provided:

- Text fields
- Check box fields
- Drop-down fields

**NOTE:** By default and for easy identification, form fields in an online form are shaded. To turn field shading either on or off, click the *Field Shading* button on the Forms toolbar.

## How to access the Form Toolbar

- View / Toolbars / Form

OR

- Right click on any toolbar, select Forms



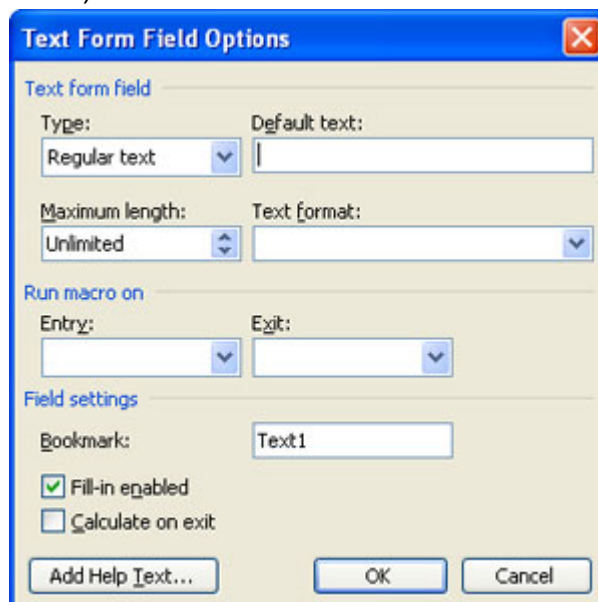
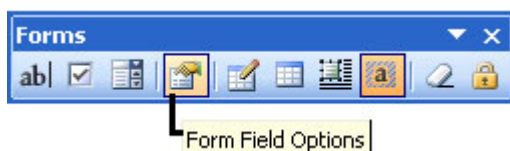
## TEXT Form Fields

To insert a text field

- Click on the **ab** icon on the Forms toolbar (1<sup>st</sup> icon)

There are **six different types** of form field; to select the most appropriate field (or to modify a text field), you will need to display the *Text Form Field Options* dialogue box by doing one of the following:

- double-click the field in the document,
- OR
- select the field in the document and click the *Form Field Options* button on the Forms toolbar.



### Text form field options

Depending upon the type of text form field chosen, the default format and custom format options change.

- **Regular text** - use this when the form requires an entry of any type, be it text, numbers or symbols. Under *Default Text* type in the text that perhaps assumes the response of the user - they will only need to type an entry if they need to change the response. If the *Default Text* box is left blank, then the field will also be left blank.
- **Number** - use this when the field requires a numeric entry; again a default number can be displayed if required.
- **Date** - use this when a date is required; again you can display a default date in the form field.
- **Current Date** and **Current Time** - both the current date and current time are supplied by WORD and therefore the default date/time box is unavailable. However chosen formats can be applied to the current date/time and are effected when the insertion point leaves the field.
- **Calculation** - use this when you require a row or column of figures to be added or subjected to some other calculation. WORD uses an =(Formula) field to perform calculations. Type the expression for the calculation in the *Expression* box.

The *Maximum Length* box determines the width of the field in a form. The text form field adjusts to accommodate the input text, up to the maximum number of characters you specify in the *Maximum Length* box (no more than 255 characters are allowed).

**Note:** The chosen formatting for Text, Number and Date form entries only takes effect when the insertion point leaves the field; WORD will also display an error message if the entry within a field is not valid.

Current Date, Current Time and Calculation form fields cannot be edited whilst the form is being filled in, but to update all fields before printing, make sure you have the Update Fields check box selected in the TOOLS-Options-Print tab.

### To apply character formatting to a form field

1. Select the form field requiring the formatting.
2. Choose the **Format / Font** command and type/select the required character formatting and/or spacing and choose **OK**.

## CHECK BOX Form Fields

To insert a Check Box field ☐

- Click on the **tick box** icon on the Forms toolbar (2<sup>nd</sup> icon)

Check box form fields prompt the user to provide a 'yes' or 'no' response. You should type a label for the check box in the form, then insert a check box form field next to the label.

A checked box = Yes ☒ an empty box = No ☐

## Check Box form field options

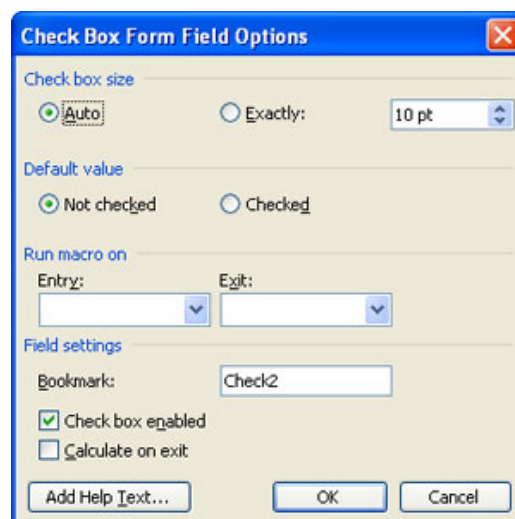
To set options for the check box (or to modify a check box), you must display the *Check Box Form Field Options* dialogue box by doing one of the following:

- double-click the field in the document,

OR

- select the field in the document and click the Form Field Options button on the Forms Toolbar.

You must decide how large the check box is to be under *Check Box Size*. Choose *Auto* if you wish your check box to be the same size as the surrounding text, or the *Exactly* option to specify an exact size.



## DROP-DOWN Form Fields

To insert a Drop Down field

- Click on the **list box** icon on the Forms toolbar (3<sup>rd</sup> icon)

Use drop-down form fields when you need to present a list of possibilities from which the user can select the most appropriate item. You may wish to add 'None' to the list of choices. The item at the top of the list is the default selection, but whichever option is highlighted at the time of printing is the one that appears on the hard copy.

## To add or delete items in a drop-down list

- Double-click the drop-down form field to which you require an item to be added, or from which you require an item to be deleted.
- Add** - in the Drop-Down Item box, type the text you want to add to the list (up to 50 characters) and choose the Add button. Repeat steps 1 and 2 for every item you wish to add to the list.
- Delete** - in the Items in Drop-Down List, select the item which you want to remove from the list and choose the Remove button. Repeat steps 1 and 3 for every item you wish to remove from the list.
- Choose **OK**.



### To change the order of items in the drop-down list

1. Double-click the drop down form field which you need to modify.
2. Under Items in Drop-Down List, select the item you wish to move and use the Up Arrow or Down Arrow buttons to move the item up or down respectively.
3. Choose OK.

### Protecting a Form

1. Choose the **Tools / Protect Document**. The Protect document task pane will open on the right.
2. Under **2. Editing restrictions**, click on the check box next to Allow only this type of editing in the document
3. Select **Filling in forms** from the list
4. Under **3. Start enforcement** click on the Yes, Start Enforcing protection button.
5. Type a password (up to 15 characters) in the Password box. Reenter the password then click **OK**.

**Note:** remember to use the same combination of upper and lower case letters when you come to use the password again.



Access to the master form is only allowed for those users who know the password. Only users who know the password can edit the form or change the protection.

### When a document is protected the following changes occur to the document:

- Form fields are activated.
- Field results are displayed instead of field codes.
- The insertion point can move only to form fields and unprotected sections allowing users to input their data without detrimental effect to the master form.
- You cannot select the entire document.
- Table column widths are fixed.
- The Find, Replace and Go To commands are only available in the form fields and in unprotected sections of the document.
- Some menu commands are unavailable.
- Entry macros, exit macros and form field Help functions are activated.

### To remove the protection from the document

1. Click on **Tools / Unprotect Document**.
2. Enter the **password** and click **OK**

